



User Manual
Washington, D.C.
Superior Court, Probate Division

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CaseFileXpress (CFX) makes it easy to eFile and eServe court documents no matter where you are and no matter what time it is. The process is simple and we guide you through every step of the way!

Please review the District of Columbia Superior Court's Administrative Order (Probate Division) for further information about eFiling rules and requirements at www.dccourts.gov/efiling or, from the CaseFileXpress eFiling page at www.casefilexpress.com – click on “Jurisdictions” tab and select “Washington” from the drop down list to access information about eFiling with the District of Columbia Superior Court (Court).

Submit a Filing




Screen: “Submit New Filing”

3 easy steps to submit an eFiling (required fields are identified with an orange asterisk).

Step 1: Enter Filing Information

- 1) After login, the first screen presented is your Dashboard. To submit a filing, click on the blue box entitled **Submit New Filing** in the upper right-hand corner of the screen.

The following are symbols used on the dashboard with associated definitions:

-  Yellow Exclamation Mark -Filing was submitted to the court and is awaiting review by the Court Clerk
-  Green Check Mark - Filing was accepted by the Court Clerk.
-  Red Exclamation Mark – Filing was rejected by the Court Clerk; you must correct and resubmit your filing

***Note:** At this time, only filings for existing cases can be filed electronically in the Probate Division. Please see Administrative Order 13-___ for a list of filings that are excluded from eFiling and must be filed in paper.

- 2) Next, choose the **Filing Type**.

***Note:** If you choose **eFile and eServe**, your filing will be submitted to the Probate Division and eService will be sent to the persons you add to the eService list. The eService list is created by our users and is not retrieved from the court's case management system.

***Note:** If you choose **Discovery Service**, eService of your discovery documents will be sent to counsel and parties *only*. Your filing will not be submitted to the court.

3) Enter the **Filing Details**.

a.

Select the eFiler from the **Filing Attorney** drop down list.

***Note:** Delegates (legal staff) may file on behalf of an attorney and often are designated to file for more than one attorney. If you are a delegate filing for an attorney, please be sure to choose the **correct filing attorney's** User ID.

***Note:** If you do not see your attorney in the drop down list, then you must be added as a delegate for the attorney. Please contact your firm administrator or CFX Customer Support for assistance.

b. Under **Court Assignment**, click the drop down list and select Probate Division.

c. Enter the case number in the field **Case Number**.

*** Note:** All case numbers must be entered in accordance with the Court's case number format, for example 2014 ADM 000001. You may look up your case number in all cases involving a deceased person or in Major Litigation cases on the court's docket at <https://www.dccourts.gov/cco>. If you have just opened the case by filing an initial pleading, the case number will be stamped on the initial filing and on your receipt for court costs, if any. Be sure to enter the case number in its correct format or your filing may be automatically rejected.

d. Enter the case name in the field **Case Title / Style**.

*Example: "Estate of John Smith."

e. Type in the firm's internal client matter number in the field **Client Matter Number**.

***Note:** Client matter numbers are typically used by our firms for internal billing purposes and can be any combination of numbers or letters. If you do not use a client matter number, then you can enter "N/A", a "1" or a client name.

f. If you have a **Promotional Code**, click yes and enter it. Otherwise, click no. If you received an order granting your *Application to Proceed without Prepayment of Costs, Fees or Security (In Forma Pauperis)*, please contact CFX Customer Support at (877) 433-4533 and request the Probate promotion code to waive court fees.

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Submit New Filing 1. Filing Information 2. Upload Documents 3. Services & Fees Confirm & Submit

1. Enter Filing Information * Required

Please select the Filing Type and enter the required Filing Details. Create your service list, if needed. You may also modify the service list for existing cases. Click Next to continue.

Filing Type

☒ eFile and eServe ☐ Discovery Service

Filing Details

* Filing Attorney:

* Jurisdiction:

Complaint: ☐ Yes ☒ No

* Court Assignment:

* Case Number:

* Case Title/Style:

* Client Matter:

Use Promocode: ☐ Yes ☒ No

Create Service List

[Add Attorneys & Judges](#)

Last Name	First Name	Organization	Bar Number	Email	* Role	* Service
Glover	Danny	CaseFileXpress Training	999999	danny@cfxpress.com	- Select -	None

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4) **Create the Service List**

- a. To add the Judge, counsel, and parties registered for eService to the case, click on the link **Add Attorneys & Judge**.

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Submit New Filing 1. Filing Information 2. Upload Documents 3. Services & Fees Confirm & Submit

1. Enter Filing Information * Required

Please select the Filing Type and enter the required Filing Details. Create your service list, if needed. You may also modify the service list for existing cases. Click Next to continue.

Filing Type

☒ eFile and eServe ☐ Discovery Service

Filing Details

* Filing Attorney:

* Jurisdiction:

Complaint: ☐ Yes ☒ No

* Court Assignment:

* Case Number:

* Case Title/Style:

* Client Matter:

Use Promocode: ☐ Yes ☒ No

Create Service List

[Add Attorneys & Judges](#)

Last Name	First Name	Organization	Bar Number	Email	* Role	* Service
Glover	Danny	CaseFileXpress Training	999999	danny@cfxpress.com	- Select -	None

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- b. Probate Division eFilings will be eServed to a generic Probate Division judge called "Judge Probate Division." Search for this judge by entering "Judge Probate Division" in the Last Name field and then click search.
 - * **Note:** You **must** add "Judge Probate Division" to the case or you will not be able to proceed to the next step.
- c. Click **+Add** next to "Judge Probate Division".

Add Attorneys & Judges

Name Search

To locate a name, you can search by Last Name, First Name, Organization or Bar Number.

Last Name	First Name	Organization	Bar Number	Search
<input type="text" value="judge"/>	<input type="text" value="probate"/>	<input type="text"/>	<input type="text"/>	

Select	Last Name	First Name	Organization	Email	Bar Number
+Add	Judge	Probate	CaseFileXpress Training	JudgeProbateEServe@dcsc.gov	999999

Added Names

+Remove	Tomlin	Lily	CaseFileXpress Training	lily@casefilexpress.com	999999
-------------------------	--------	------	-------------------------	-------------------------	--------

Cancel

Done

- Add parties registered for eService to the eService list by using the search criteria. You may enter a first name, last name or bar number and click **Search**. Adding too many search fields may yield no results. In this situation, enter one search field and try again.
- Add each party registered for eService to the eService list by clicking **+Add** next to his or her name.
- Each name you add will appear under the heading **Added Names**. You may remove a party registered for eService or Judge by clicking **+Remove**.
- Once you have located and added all parties registered for eService and Judge Probate Division, click **Done**.

Add Attorneys & Judges

Name Search

To locate a name, you can search by Last Name, First Name, Organization or Bar Number.

Last Name	First Name	Organization	Bar Number	
Probate Division	Judge			Search

Select	Last Name	First Name	Organization	Email	Bar Number
+Add	Probate Division	Judge	CaseFileXpress Training	JudgeProbateEServe@dcsc.gov	999999

Added Names

+Remove	Tomlin	Lily	CaseFileXpress Training	lily@casefilexpress.com	999999
--	--------	------	-------------------------	-------------------------	--------

Cancel

[Done](#)

- h. Once the eService list is complete, choose the **Role** for the Judge and each party registered for eService using the drop down list provided.
- *Note:** You may remove a party registered for eService by clicking the trash can icon next to his or her name. However, it's best to click "**None**" in the service option if you do not want to serve the party or counsel to a party on the eService list unless, you are certain they are no longer in the case.
- *Note:** The service method for the eFiler or eFiling attorney of record will read as "None" next to his or her name. The eFiler or eFiling attorney of record is not eServed but, will receive the file-stamped copy of the lead document filed.

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Submit New Filing

1. Filing Information

2. Upload Documents

3. Services & Fees

Confirm & Submit

1. Enter Filing Information

* Required

Please select the Filing Type and enter the required Filing Details. Create your service list, if needed. You may also modify the service list for existing cases. Click Next to continue.

Filing Type

☒ eFile and eServe
☐ Discovery Service

Filing Details

Filing Attorney: dannyglover

Jurisdiction: D.C. Superior Court

Complaint: ☐ Yes ☒ No

Court Assignment: Probate Division

Case Number: 2011 ADM 000012

Case Title/Style: John Smith v. ABC Corporation

Client Matter: 123 1234

Use Promocode: ☐ Yes ☒ No

Create Service List

Add Attorneys & Judges

Last Name	First Name	Organization	Bar Number	Email	Role	Service
Glover	Danny	CaseFileXpress Training	999999	danny@cfxpress.com	Petitioner Attorney	None
Tomlin	Lily	CaseFileXpress Training	999999	lily@casefilexpress.com	Defendant Attorney	eServe
Seinfeld	Jerry	CaseFileXpress Training	999999	jerry@cfxpress.com	Other	eServe

Cancel

Next >

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- i. **Party information is turned off at this time. This will become available when eFiling of complaints is accepted.**
- j. Click **Next**.

Step 2: Upload Documents

- 1) Click on the drop down list for **Document Type** and select the type of document you are filing.

***Note:** Your selection determines the court filing fee required by Probate Division rules of procedure. This list is not provided by CFX. If you select the incorrect document type and the actual court fee is higher or lower, the clerk will reject the filing for failure to include proper court costs. You must resubmit your filing under the correct document type. A rejected filing will not be docketed.

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Submit New Filing | 1. Filing Information | 2. Upload Documents | 3. Services & Fees | Confirm & Submit

2. Upload Documents * Required

Please select your document type from the drop-down list. This will determine your court fee. Click the browse button to select your lead document, then click upload. Follow the same process to upload supporting documents. CFX will convert most native formats to PDF. The maximum size per filing is 30 megabytes. Click Next to continue.

Upload Document for Filing ⓘ

Document Type: (S20 00) Motion to File: ▼

Select a file to upload: Browse Upload

Document	Action	Category	Page Count	Size (MB)
----------	--------	----------	------------	-----------

Merge Supporting Documents ⓘ

☐ I have verified that the documents have converted correctly

Cancel < Previous Next >

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- 2) To attach your documents click the **Browse** button next to the field **Select a File to Upload**.

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Submit New Filing | 1. Filing Information | 2. Upload Documents | 3. Services & Fees | Confirm & Submit

2. Upload Documents * Required

Please select your document type from the drop-down list. This will determine your court fee. Click the browse button to select your lead document, then click upload. Follow the same process to upload supporting documents. CFX will convert most native formats to PDF. The maximum size per filing is 30 megabytes. Click Next to continue.

Upload Document for Filing ⓘ

Document Type: (S20 00) Motion to File: ▼

Select a file to upload: Browse Upload →

Document	Action	Category	Page Count	Size (MB)
----------	--------	----------	------------	-----------

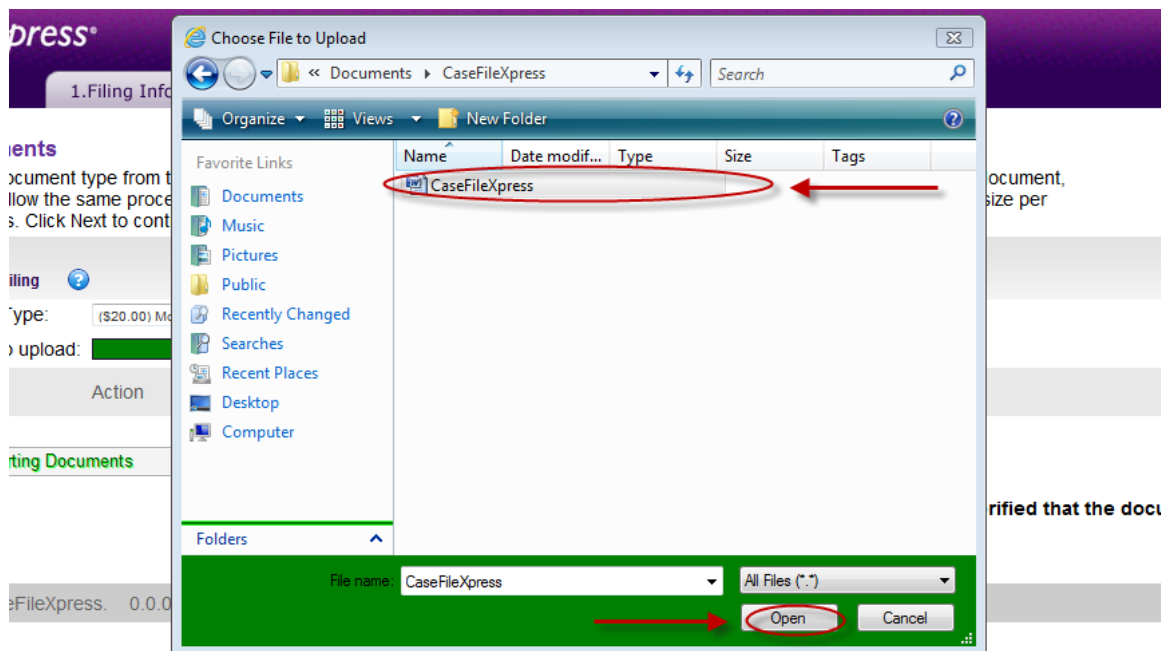
Merge Supporting Documents ⓘ

☐ I have verified that the documents have converted correctly

Cancel < Previous Next >

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- a. Navigate through network/folders/desktop/peripheral devices, etc. on your computer to locate your documents.
- b. Highlight the document you want to attach and click **Open**.



c. Click **Upload**.

***Note:** Documents and exhibits uploaded are automatically converted to .PDF format by the CFX application before submission to the Court.

***Note:** The CFX application does not allow browsing documents stored in a document management system (DMS) such as Imanage, Hummingbird or DocsOpen. In order upload a document stored in a DMS, you must move the document from your DMS to your desktop or a folder on your computer or network.

***Note:** Scanning documents at a high resolution creates larger files. Larger documents will take longer to upload. Most new scanners have a default resolution setting of 800 dots per inch (DPI). If a large supporting document or exhibit document must be scanned, we recommend setting your scanner setting to a lower resolution, such as 200 DPI.

***Note:** The total filing size allowed per filing is 30MB. The total filing size is calculated and displayed on the screen each time a document is uploaded or removed. To file documents that are larger than 30MB, this will require multiple filings. Please see the FAQs on our website or contact customer support at 877-433-4533 for more information.

***Note:** Valid document types are:

- Microsoft Word and WordPerfect documents
- text files
- images
- spreadsheets
- .TIF, .JPEG, BMP
- Adobe .PDF files

The first page of the lead document will be stamped with the time and date of submission.

- d. To upload one or more documents, follow the same process as above to browse and select documents.
- e. Once all documents are uploaded, designate all as the lead document.

CaseFileXpress Submit New Filing 1. Filing Information 2. Upload Documents 3. Services & Fees Confirm & Submit

2. Upload Documents * Required

Please select your document type from the drop-down list. This will determine your court fee. Click the browse button to select your lead document, then click upload. Follow the same process to upload supporting documents. CFX will convert most native formats to PDF. The maximum size per filing is 30 megabytes. Click Next to continue.

Upload Document for Filing

Document Type: (\$20.00) Motion / File:

Select a file to upload:

Document	Action	Category	Page Count	Size (MB)
CaseFileXpress	Rename	Leading Document	2	0.2
Attachment 1	Rename	Supporting Document	5	0.78
Attachment 2	Rename	Supporting Document	34	0.56

☐ I have verified that the documents have converted correctly

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- f. To delete uploaded documents, click on the trash can icon.
- g. To merge two or more supporting documents, click **Merge Supporting documents**.

***Note:** Supporting documents will be merged to form a single PDF document in the order they were uploaded and with an automatic page break between each document.
- h. To review your document(s), click on the .PDF file name.

***Note:** Adobe Acrobat Reader must be installed on your PC to open the document. Older versions of Acrobat Reader can be an issue when viewing your PDF documents. If you have difficulty opening the document to review, you can save it to your computer and review it.
- i. After reviewing the document, close the Adobe window and check the box, **I have verified that the documents have been converted correctly**.

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[Submit New Filing](#)
[1.Filing Information](#)
[2.Upload Documents](#)
[3.Services & Fees](#)
[Confirm & Submit](#)

2. Upload Documents

Please select your document type from the drop-down list. This will determine your court fee. Click the browse button to select your lead document, then click upload. Follow the same process to upload supporting documents. CFX will convert most native formats to PDF. The maximum size per filing is 30 megabytes. Click Next to continue.

* Required

Upload Document for Filing

Document Type:

(\$20.00) Motion to File:

Select a file to upload:

Browse

Upload

Document	Action	Category	Page Count	Size (MB)
CaseFileXpress	Rename	Leading Document	2	0.2
Attachment 1	Rename	Supporting Document	5	0.78
Attachment 2	Rename	Supporting Document	34	0.56

Merge Supporting Documents

☐ I have verified that the documents have converted correctly

Cancel

< Previous

Next >

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j. Click **Next**.

Step 3: Services & Fees

- 1) A detailed list of the fees associated with your filing is listed under the section **Filing Fees**. Verify all fees are correct.

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Submit New Filing | 1. Filing Information | 2. Upload Documents | 3. Services & Fees | Confirm & Submit

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3. Services & Fees

Please confirm your court fee. You may change the court fee by modifying the document type in Step 2. Click Confirm to review your information before submitting your filing to the clerk. * Required

No Services available at this time.

Filing Fees

Jurisdiction:	D.C. Superior Court	
Court Assignment:	Probate Division	
Document Type:	Motion	\$20.00
CaseFileXpress Fees:		
eFiling Fees		\$15.00
Subtotal		\$35.00
(Includes NIC Processing)		
Total:		\$37.05

Cancel

< Previous | Confirm >

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- 2) Click **Confirm**.

Confirm & Submit

- 1) If you would like to submit your filing at a later time, click **Save as Draft**. Your filing will be saved and can be retrieved from the Drafts section of your dashboard when ready to complete and/or submit your filing.

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Submit New Filing 1. Filing Information 2. Upload Documents 3. Services & Fees **Confirm & Submit**

Confirm & Submit

Please review all of the information below. You may edit information as needed or navigate to a previous step by clicking the numbered tab. You may save this filing as a draft by clicking the Save as Draft button. Drafts are available for filing from your Dashboard. If needed, enter instructions for the court clerk in the Special Instructions window. Click Submit Filing to complete. *Required

Filing Information [Edit](#)

Case Title:	John Smith v. ABC Corporation	Petitioner(s) Plaintiff(s):	
Jurisdiction:	D.C. Superior Court	Plaintiff Attorney(s):	
Court Assignment:	Probate Division	Defendant Attorney(s):	Lily Tomlin
Case Number:	2011 ADM 000012	Judge:	Probate Judge
Document Type:	Motion	Court Reporter:	
		Others:	Danny Glover, Jerry Seinfeld
		Client Matter Number:	123 1234

Please do not enter an apostrophe in your instructions to the Clerk until further notice.

Special Instruction to the Clerk:

Document Information [Edit](#)

CaseFileXpress.pdf	Lead Document	Motion
Attachment1.pdf	Supporting Document	Motion

Payment Information [Edit](#)

* Select Payment Option:

Payment Method:

Credit Card Type:

Credit Card #:

Cardholder Name:

Personal Information

Filer ID: dannyglover

Attorney of Record: Danny Glover

Filer Name: Danny Glover (dannyglover)

Law Firm/Organization: CaseFileXpress Training

Bar Number: 999999

Filer Position: Petitioner Attorney

Address: 105 Decker Court, Irving, TX, 75062

Phone: (877) 455-4533

Fax: (866) 475-5470

Email: danny@cfexpress.com

[Cancel](#) [Save as Draft](#) [Submit Filing](#)

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- 2) To proceed with your filing, review and verify all the filing information.
- 3) You can open and verify your attached documents to be filed by clicking on the file name.

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Submit New Filing 1. Filing Information 2. Upload Documents 3. Services & Fees **Confirm & Submit**

Confirm & Submit

Please review all of the information below. You may edit information as needed or navigate to a previous step by clicking the numbered tab. You may save this filing as a draft by clicking the Save as Draft button. Drafts are available for filing from your Dashboard. If needed, enter instructions for the court clerk in the Special Instructions window. Click Submit Filing to complete. *Required

Filing Information [Edit](#)

Case Title:	John Smith v. ABC Corporation	Petitioner(s) Plaintiff(s):	
Jurisdiction:	D.C. Superior Court	Plaintiff Attorney(s):	
Court Assignment:	Probate Division	Defendant Attorney(s):	Lily Tomlin
Case Number:	2011 ADM 000012	Judge:	Probate Judge
Document Type:	Motion	Court Reporter:	
		Others:	Danny Glover, Jerry Seinfeld
		Client Matter Number:	123 1234

Please do not enter an apostrophe in your instructions to the Clerk until further notice.

Special Instruction to the Clerk:

Document Information [Edit](#)

CaseFileXpress.pdf	Lead Document	Motion
Attachment1.pdf	Supporting Document	Motion

Payment Information [Edit](#)

* Select Payment Option:

Payment Method:

Credit Card Type:

Credit Card #:

Cardholder Name:

Personal Information

Filer ID: dannyglover

Attorney of Record: Danny Glover

Filer Name: Danny Glover (dannyglover)

Law Firm/Organization: CaseFileXpress Training

Bar Number: 999999

Filer Position: Petitioner Attorney

Address: 105 Decker Court, Irving, TX, 75062

Phone: (877) 455-4533

Fax: (866) 475-5470

Email: danny@cfexpress.com

[Cancel](#) [Save as Draft](#) [Submit Filing](#)

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- 4) Under **Payment Information**, select one option, either to **Use the stored credit card information for this account** or **Specify payment information for this transaction**.

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Submit New Filing 1. Filing Information 2. Upload Documents 3. Services & Fees Confirm & Submit

Confirm & Submit

Please review all of the information below. You may edit information as needed or navigate to a previous step by clicking the numbered tab. You may save this filing as a draft by clicking the Save as Draft button. Drafts are available for filing from your Dashboard. If needed, enter instructions for the court clerk in the Special Instructions window. Click Submit Filing to complete the transaction.

Filing Information Edit

Case Title:	John Smith v. ABC Corporation	Petitioner(s) Plaintiff(s):	
Jurisdiction:	D.C. Superior Court	Plaintiff Attorney(s):	
Court Assignment:	Probate Division	Defendant Attorney(s):	Lily Tomlin
Case Number:	2011 ADM 000012	Judge:	Probate Judge
Document Type:	Motion	Court Reporter:	
		Others:	Danny Glover, Jerry Seinfeld
		Client Matter Number:	123 1234

Please do not enter an apostrophe in your instructions to the Clerk until further notice.

Special Instruction to the Clerk:

Document Information Edit

CaseFileXpress.pdf	Lead Document	Motion
Attachment1.pdf	Supporting Document	Motion

Payment Information Edit

Select Payment Option:

Payment Method: **Credit Card**

Credit Card Type: **MasterCard**

Credit Card #: XXXX-XXXX-XXXX-4444

Cardholder Name: Danny Glover

Personal Information

Filer ID: dannyglover

Attorney of Record: Danny Glover

Filer Name: Danny Glover (dannyglover)

Law Firm/Organization: CaseFileXpress Training

Bar Number: 999999

Filer Position: Petitioner Attorney

Address: 105 Decker Court, Irving, TX, 75062

Phone: (877) 456-4633

Fax: (866) 475-5470

Email: danny@cfxpress.com

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* **Note:** Individual filers may store payment information from their dashboard.

Drafts ?

My Account/eService

Payment Information

Name:

Address:

City:

State:

Zip:

Credit Card Type:

Credit Card Number:

Expiration Date:

Note: Firm managers may store firm payment information for each office by using the CFX management system.

- 5) If you need to make any changes to any section of the filing information or, changes to uploaded documents, use the **Edit** button provided in the header of each section. You will be directed back to that section and can make any necessary changes.

***Note:** Do not use your browser's **Back** button. To cancel the filing, click **Cancel**.

- 6) To submit this filing, click **Submit Filing**.

***Note:** By clicking on **Submit Filing**, your filing will be submitted to the Probate Division. CFX cannot cancel, retrieve, or make any changes to the filing after it has been submitted. . Payment is not processed until the clerk accepts the filing. Payment will not be processed if the clerk rejects the filing.

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Submit New Filing 1. Filing Information 2. Upload Documents 3. Services & Fees Confirm & Submit

Confirm & Submit

Please review all of the information below. You may edit information as needed or navigate to a previous step by clicking the numbered tab. You may save this filing as a draft by clicking the Save as Draft button. Drafts are available for filing from your Dashboard. If needed, enter instructions for the court clerk in the Special Instructions window. Click Submit Filing to complete the transaction. *Required

Filing Information Edit

Case Title:	John Smith v. ABC Corporation	Petitioner(s) Plaintiff(s):	
Jurisdiction:	D.C. Superior Court	Plaintiff Attorney(s):	
Court Assignment:	Probate Division	Defendant Attorney(s):	Lily Tomlin
Case Number:	2011 ADM 000012	Judge:	Probate Judge
Document Type:	Motion	Court Reporter:	
		Others:	Danny Glover, Jerry Seinfeld
		Client Matter Number:	123 1234

Please do not enter an apostrophe in your instructions to the Clerk until further notice.

Special Instruction to the Clerk:

Document Information Edit

CaseFileXpress.pdf	Lead Document	Motion
Attachment1.pdf	Supporting Document	Motion

Personal Information Edit

Filer ID:	dannyglover
Attorney of Record:	Danny Glover
Filer Name:	Danny Glover (dannyglover)
Law Firm/Organization:	CaseFileXpress Training
Bar Number:	999999
Filer Position:	Petitioner Attorney
Address:	105 Decker Court, Irving , TX , 75062
Phone:	(877) 455-4533
Fax:	(866) 475-5470
Email:	danny@cfxpress.com

Payment Information Edit

Select Payment Option:

Payment Method: **Credit Card**

Credit Card Type: **MasterCard**

Credit Card #: **XXXX-XXXX-XXXX-4444**

Cardholder Name: **Danny Glover**

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- 7) Print out the confirmation page for your records or, print screen to maintain an electronic copy.
- 8) In addition, you will receive an Acknowledgement email notification from CFX upon submission. You may review the details of your filing submission and monitor the status of clerk processing from your Dashboard screen.